Step 1

Step 1: Your Main Purpose as a Foreclosure Bailout Representative
Your main purpose as a Foreclosure Bailout Representative (FBR) is to

1: Post 4 listings everyday, Sundays through Saturdays
Following Step2a through Step2d is very important to do everyday. Its best to post your listings in the morning to get it out of the way then complete your FBR File Submission afterwards. You'll know more in detail in Step2. Completing Step2e every Sunday is also required.

2: Encourage all Potential Clients to complete the online application

3: Encourage all Clients to pay their invoice for Credit Pull within 1 day of completing the online application

4: Get each Client to submit all Documents that's on the Client Checklist within 3 days of them paying their invoice. Step1i and Step5a has detailed information on how to clear the Client Checklist and when the time starts.

These four steps are your main priority as a FBR. We are going to call this the Four Step Process. Make this apart of your **DAILY ROUTINE** to do **EVERYDAY** to avoid Compensation Penalties.

Step 1a

Step 1a: Paperwork
In the Paperwork Section of the Training Site, you'll see documents that need to be to be completed, signed, dated & returned to our Back Office within 7 days of employment. Download, & print all 4 documents for completion & e-mail it to: Processing@PhoneOpsFunding.com or fax it to: 253-252-8754.

Step 1b

Step 1b: FBI National Criminal Background Check
PhoneOps is required to run a Criminal Background Check on you to stay in compliance with State Law *(One of the documents you had to download in Step1a)*. Your job gives you access to our Client's important documentation and we want all

Step 1b - Continues

Clients to be safe and secure as we don't want any Fraud situations, no Identity Theft situations, etc.

The fee for your Criminal Background Check is $69. We highly recommend that you go ahead and work; get your Clients to pay their invoices, build up a check for yourself and allow this fee to be deducted from your Paycheck. PhoneOps doesn't require you to pay this up front or out of pocket.

While completing the form, if anything negative that you are aware of, all you have to do is provide an LOX *(Letter of Explanation)* for each negative situation and provide documentation supporting your LOX. It is best to be honest and up front the first go around as having Trust goes a long way.

Step 1c

Step 1c: Gmail Account
You are required to have a gmail account in order to gain access of all Google Databases. When creating a Dedicated Gmail account, remember to include PhoneOps in your e-mail somewhere to keep it professional. **Example:**

YourNamewithPhoneOps@gmail.com. After your e-mail has been created, e-mail: Processing@PhoneOpsFunding.com and put in Subject Line: New Gmail Account.

Once we have your gmail e-mail address, we'll use that e-mail from that point forward. You are required to check your e-mails everyday throughout the day.

Step 1d

Step 1d: Setting up your voicemail
Since you are using your own dedicated phone line, you must keep this professional and change your current voicemail to:

Hello, you reached Mrs. / Mr. *(your first and last name)* with PhoneOps Funding, LLC. I am currently unavailable assisting others. Please leave your name, contact number, e-mail address and the nature of your call and I'll respond within 12 hours.

Step 1d - Continues

E-mail Processing@PhoneOpsFunding.com your dedicated Phone Number so our Back Office can call to listen to your voicemail. Checking your voicemail and responding back to potential Clients is **MANDATORY.** You must do this everyday several times throughout the day.

Step 1e

Step 1e: Learning the Foreclosure Bailout Program
It is very important to know and learn the Foreclosure Bailout Program. Go to:

www.PhoneOpsFunding.com/ForeclosureBailout

Read and study this site, get a good understanding of this program and how it works. Then go to our Needed Forms Page and download the following forms for this program:

- Foreclosure Bailout Program Agreement
- Foreclosure Bailout Questionnaire

These two forms are apart of the program. Study both documents and make sure that each client completes both forms when applying for this program.

Step 1f

Step 1f: Google Drive - The "Drive"
Once you've completed Step1c, you'll receive access of your Google Drive Folder. All your Clients' documentation will go in this folder.

NEVER DELETE ANYTHING IN THIS FOLDER. You will work directly with each assigned Client on a daily basis.

Step 1g

Step 1g: Creating Folders in the Drive
Once you have access to the Google Drive Folder, you'll need to create 3 additional folders inside your main folder. Do the following:

- Double-click your folder to open it
- Click New on top left side
- Click Folder
- Name new folder 1. Paid Clients
- Click Create
- Repeat the above steps to create 2. No Go & 3. 3rd Party Processing

Step 1h

Step 1h: File Submission for Clients
This site is for all Clients' Documentation:

www.PhoneOpsFunding.com/FileSubmission

Always send each client to this site to upload his or her documents. Some clients will e-mail you documents; simply inform them that they must upload the documents to the site for compliance reasons. If any Client has problems with uploading documents & they insist on e-mailing the documents, do the following:

- Accept the documents by e-mail
- Put the documents in their folder on the Drive
- Update their Check List
- E-mail Processing@PhoneOpsFunding.com to inform the Back Office that you uploaded new docs to the Drive & updated the Checklist.

Step 1i

Step 1i: Client Check List
It is very important to know what documents are needed for this Program. You'll have to work with each Client to get all documents that's on the Client Checklist cleared.

You have 3 Days To Get All Documents Cleared!

Follow these steps to get started:

- Go to: www.PhoneOpsFunding.com/CheckList
- Click on the Checklist for this Program
- View all documents that's needed
- Take notes if you need to

It is very important to understand how to clear off items on the Client Checklist as you have 3 Days to get all Documents Cleared. Make sure you view Step1i-HelpfulTool to get a good understanding on what's needed in order to Clear off a document on the Client Checklist.

Step 1j

Step 1j: PDF Converter Software
This software is very important to have as it is a **MUST**. Click on the following link to download the software:

www.PhoneOpsManagement.com/smartpdfconverter-setup.exe

- Once it pops up, click Save File
- A message may appear depending on your Operating System: Do you want to allow this app from an unknown publisher to make changes to your device?
- Click Yes
- Then follow the prompts from that point to install the software

Step 1k

Step 1k: PDF Creator Software
This software is very important to have as it is a **MUST**. Click on the following link to download the software:

http://www.PhoneOpsManagement.com/PDFCreator-0_9_6_setup.exe

- Once it pops up, click Save File
- A message may appear depending on your Operating System: Do you want to allow this app from an unknown publisher to make changes to your device?,
- Click Yes
- Then follow the prompts from that point to install the software

At this point, you should have both Softwares downloaded to your computer. If you have any problems, feel free to contact Processing at: Processing@PhoneOpsFunding.com.

Step 1l

Step 1l: Note Book Requirement
You are required to use a Note Book and to keep notes of all your Clients. You can get a few Note Books from Walmart for about $0.25 so some will get a Note Book for each Letter of the Alphabet or some will get a Note Book and put Clients in the book as they come. The choice is yours how organize you want to be.

It is very important to note everything such as when you spoke to a Client, when to call back, what property or program they are interested in, what max monthly payment they can go, etc. You will get many clients and we want everyone to keep it professional at all times.

<u>Step</u> <u>1m</u>

<u>Step 1m</u>: Follow-Up Calls
It is **MANDATORY** to do Follow-Up Calls **EVERYDAY!** It is very important to stay in contact with each Client & Potential Client on a Daily Basis as you don't want to lose that person as a Client or as a Future Client. PhoneOps also want to keep a HIGH QUALITY CUSTOMER SERVICE RECORD so remember, keeping in contact with each Client on a daily basis is **MANDATORY!**

<u>Step</u> <u>1n</u>

<u>Step 1n</u>: Needed Forms
Here are all the forms we have that are needed depending on the program. You may get Clients asking for help on how to complete certain forms. To better prepare yourself, go to: www.PhoneOpsFunding.com/NeededForms to view all documents then read through them all to have some knowledge of each document.

<u>Step</u> <u>1o</u>

<u>Step 1o</u>: Compensation Forfeit
As a reminder, you are paid $5 for each Client that pays for their Credit Pull. After your Client completes the Online Application, you have **Within 1 Day** to encourage your Client to pay for their Credit Pull or the $5 Compensation will be forfeited.

If your Client doesn't move forward after **1 Day** of submitting their application, we'll have to inform our 3rd Party Companies to step in to take over as important documentation such as birth dates & social security numbers are on each application and we don't want to sit on these applications so the compensation will have to be paid to the 3rd Party Companies at that point.

This Completes Step 1